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# Marketing the IR: Strategies from the Marquette Survey

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Much of the literature on IRs agrees on the importance of marketing, however, very few articles discuss the marketing process or give concrete examples for doing so. When we decided to create a marketing plan for MU's IR, we started with a survey and we used the results to inform the creation and implementation of a marketing plan. Also, in this context, marketing means marketing to the faculty for the purpose of receiving more materials for deposit.

## e-Publications@Marquette

- A maturing institutional repository
  - Started in 2008
  - Faculty work added starting in 2009
  - 10,000+ works (July 2014)
  - 1.5 million+ downloads (June 2014)

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Started with theses and publications in 2008. In 2009 a Digital Projects Librarian was hired to oversee the IR. Faculty works were solicited and started to be added at this time. Since that time, faculty research and publications account for approximately 42% of the materials in ePubs. The rest are ETDs, RTDs, student work, and other projects.

## A perennial problem...

- How do we keep collecting faculty work?
  - No mandate for deposit
  - No statement of support for open access from administration or the Faculty Senate

The IR exists more or less on its own within the larger scope of the university. We view it as a campus initiative, though I suspect the rest of campus mainly views it as a library initiative, with little official support from administration. It has its supporters, and a few detractors. Fortunately, the detractors aren't especially vocal and manifest mainly through apathy.



## THE SURVEY

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## The survey

- Decided to develop a small-scale marketing plan for e-Pubs
- First step was to survey the faculty
  - Gauge faculty awareness of e-Pubs
  - Why don't faculty use the IR
  - What value do faculty perceive in using the IR
  - Which additional services should be incorporated into e-Pubs

Efforts to market and raise the profile of the IR with its main constituency (faculty) have been going on since the beginning. When I started, I recognized pretty quickly that having a consistent, and repeated message was the only way we were going to keep feeding the IR. In partnership with the Coordinator of Outreach and Marketing, we surveyed the faculty to get an idea of the direction we wanted to go in for the marketing plan.

## Results

- Survey went out to 369 randomly selected faculty members
  - Minus MU Law School faculty
- 60 faculty responded, for a 16% response rate

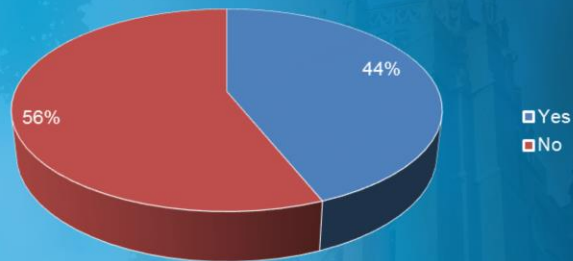
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The law school has its own IR, so we decided to exclude them from the survey. Their responses would have been based upon the Law Library's efforts in marketing their own IR, and not as useful for our purposes.

Response rate wasn't great, but was consistent with other library surveys in the past. The results weren't enough to be generalizable, but were enough to provide some direction for the marketing plan.

### Survey Results: Do faculty use e-Publications for the deposit of their work?

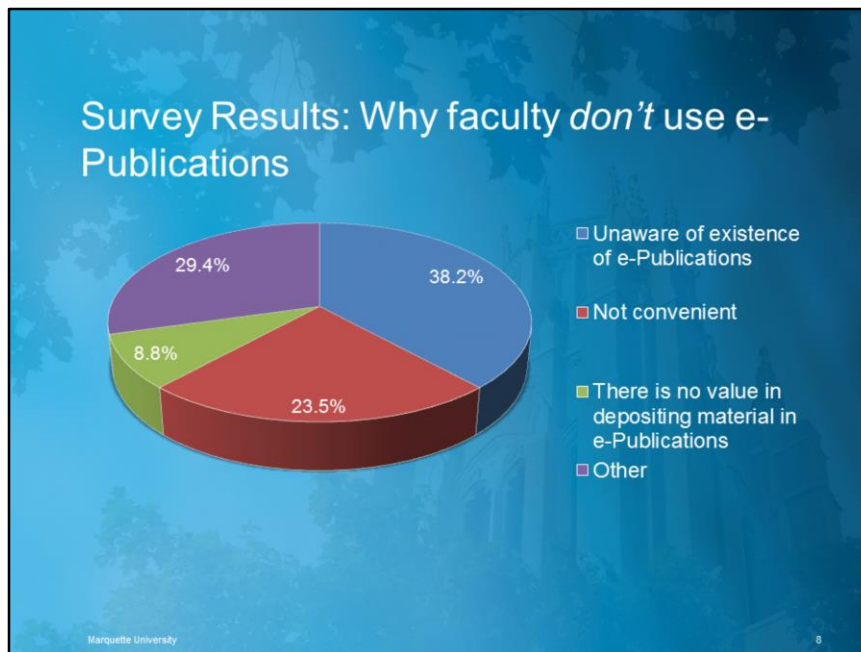


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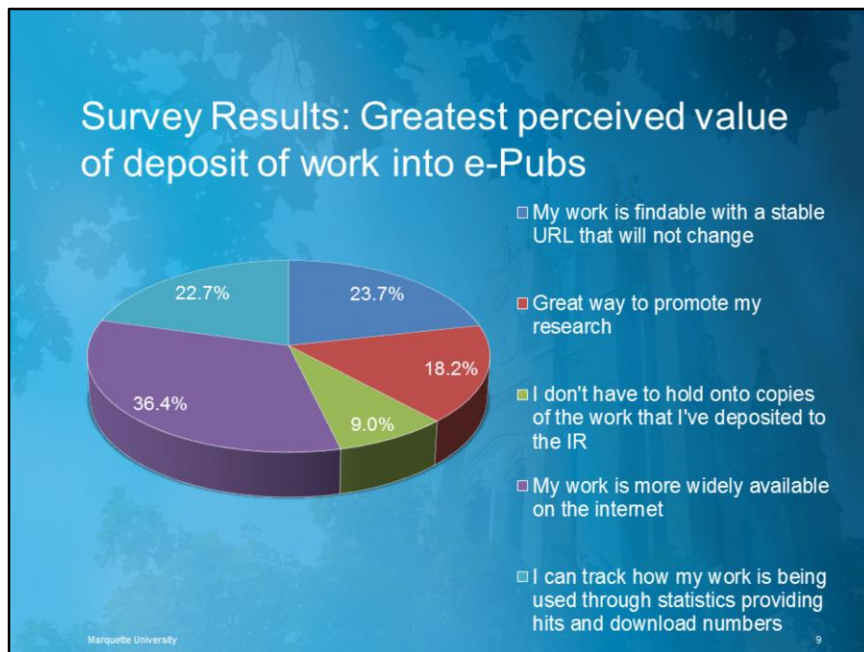
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Not a bad percentage, however analysis of our database puts the percentage closer to 39%, and that number is a little iffy. There is probably some self-selection going on here. Still, the number is decent, given our lack of a mandate or administrative support. There is definitely room for improvement.



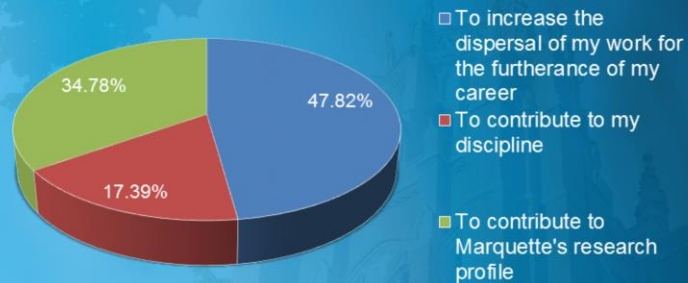


Speaks to a need for effective marketing. Almost 40% are unaware of ePubs. Depositing in ePubs *is* exceedingly easy=another opportunity for marketing. Responses under “Other” included concerns about copyright, satisfaction with current traditional avenues of research dissemination.



Greatest value is perceived mostly around the increased dissemination of research, though having use statistics was a great motivator as well.

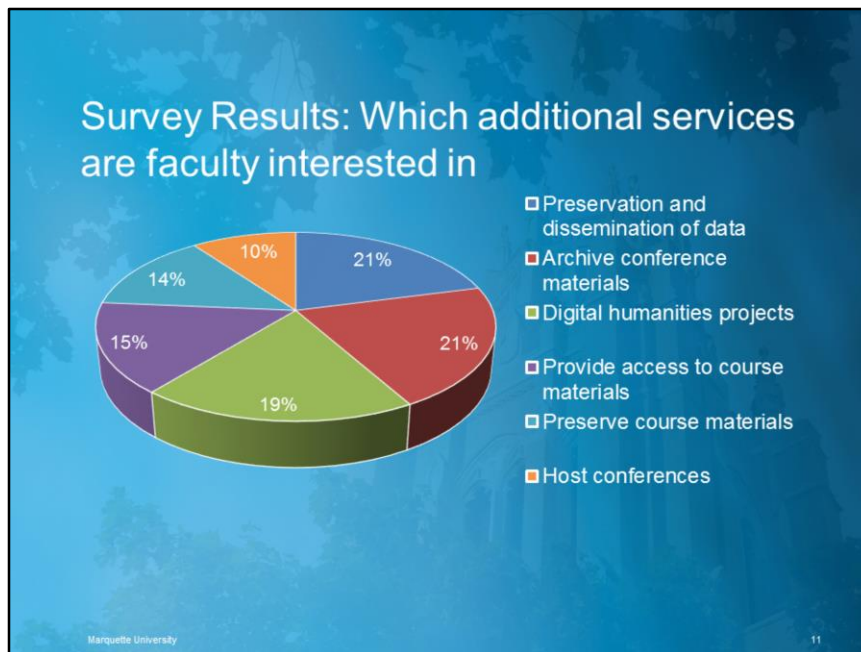
## Survey Results: Faculty motivation for depositing their work in e-Pubs



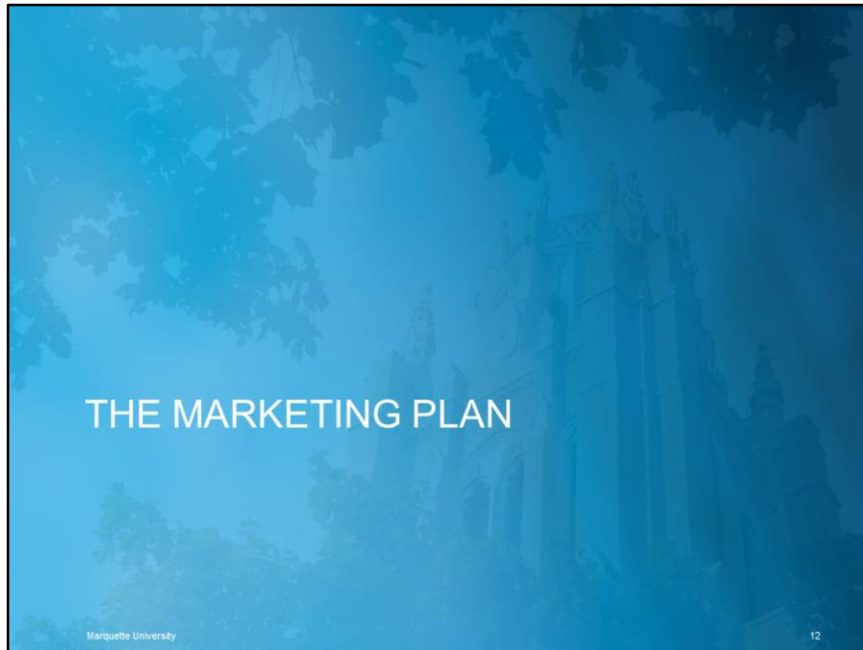
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Originally, this was a bit of a throwaway question. However, the results are interesting in that they deviate from the typical response. Most surveys have found faculty motivations hinge first on their career, second on their discipline, and third on promoting their institution.



Data and conference materials archiving were the clear winners here, with digital humanities as a close third. New services won't be discussed further in this presentation. The faculty have expressed interest in a number of new services, however, most of those can not be implemented right away. Considerations of current workflows and staffing limit our ability to fully implement services such as data preservation and digital humanities at this time, though we are experimenting with both of these concepts.



Once we analyzed the survey results, we had some concrete directions and ideas on messaging. From there, we developed a marketing plan to be implemented in the 2013/14 academic year.

| Audience | Goal  | Message   | Strategies  | Tactics   | Assessment   | Outcomes  |   |
|----------|---|---|---|---|--|---|---|
| Faculty  | 1. Increase # of submitted materials  | "The libraries can help you increase your research impact." | 1. Reach new faculty  | 1. Integrate Rose in libraries' new faculty orientation                     | 1. Before and after # of submissions for FY 2013/14  | Minimal visible impact. Group who attends libraries' new faculty orientation is small. Important to continue bc it maintains visibility.  |   |
|          | 2. Increase # of contributors   |   |   | 1. Solicit CVs from new faculty in their first semester on campus           | 2. Before and after # of contributors for FY 2013/14 | Very successful. 24 of 51 (47%) faculty solicited sent in their CV.   |   |
|          |   |   | 2. Maintain contributions from current active faculty   | 1/2/4. Become involved in faculty instruction sessions that touch on the IR |  | Minimal visible impact. Important to continue bc it maintains visibility and raises Scholarly Communication issues in the faculty's mind. |   |
|          |   |   |   | 2. Provide faculty with status documents on their work in the IR.           |  | Very successful. 54 responses to emailed report. Sent out 442, response rate of 12%. Not only new works, but also author versions.        |   |
|          | 3. Create general faculty awareness as it relates to ease of deposit (FAD/Compendium or CV) |   | 2/3. Work with dept liaisons to acquire publication citations. Rose will request faculty permission to deposit. | Pilot started, but abandoned when pilot partner left MU.                    |  |   |   |
|          |   |   | 4. Create general faculty awareness about new services  |   |  | 1/3/4. Embed Rose in new faculty FAD training.  | Unsuccessful. New faculty FAD training is almost non-existent.  |
|          |   |   |   |   |  | 2/3/4. Meet with departments to inform them about services (new and continued).   | Ongoing. Dean and Associate Dean are meeting with Deans of Colleges. Have garnered invitations to present to a number of colleges/departments in fall 2014. |
|          | 3/4. Work with COM to create an IR services card.   |   | Card created end of spring semester 2014. Too early to gauge impact.  |   |  |   |   |

## Marketing plan structure

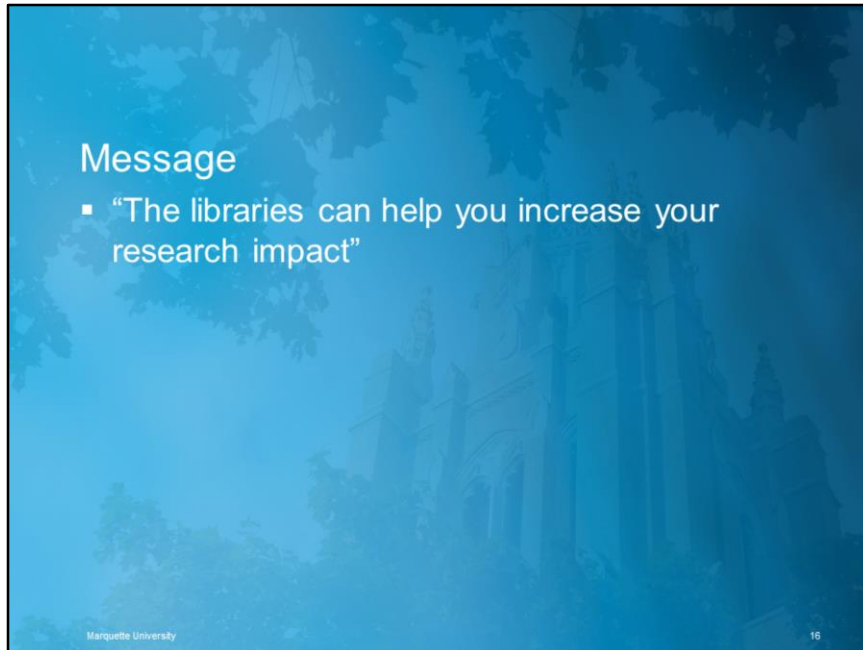
- First had to determine the basics
  - Goal
  - Message
  - Strategies
  - Tactics
  - Assessment

## Goal

- Two-fold, but related goals
  - Increase the number of submissions
  - Increase the number of faculty participants

A simple enough couple of goals, but the difficulty is in the execution.





Based upon survey findings. The statement encapsulates the ease of use and the impact of faculty research.

## Strategies

- Strategies developed were four-fold
  1. Reach new faculty
  2. Maintain contributions from current active faculty
  3. Create general faculty awareness as it relates to ease of deposit
  4. Create general faculty awareness about new services

New faculty seem more open to the message. However, we need faculty who have deposited in the past to remember that we're still here and we still want their stuff.

### Tactics: Reach new faculty

- Integrate Rose in libraries' new faculty orientation
- Solicit CVs from new faculty in their first semester on campus
- Become involved in faculty instruction sessions that touch on the IR
- Embed Rose in new faculty FAD training.

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Instruction sessions: If it touched on or tied into the IR in any way, it was a good opportunity to remind faculty about ePubs. Sessions I was included in were: NIH Compliance, Research Impact, and I also talked to some classes.

### Tactics: Maintain contributions from current faculty

- Become involved in faculty instruction sessions that touch on the IR
- Provide faculty with status documents on their work in the IR
- Meet with departments to inform them about services (new and continued)
- Work with subject liaisons to acquire publication citations; DigiProg will request faculty permission to deposit

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Some tactics serve more than one strategy. Some of them will be repeated a few times.

We walk a fine line. How do we keep the IR front and center without irritating the faculty enough that they dismiss our communications. Faculty instruction sessions are a good way to put a face to the name. Status documents remind them that the IR exists, and hopefully not too obtrusively.

## Tactics: Create general faculty awareness as it relates to ease of deposit

- Work with subject liaisons to acquire publication citations; DigiProg will request faculty permission to deposit
- Embed Rose in new faculty FAD training
- Meet with departments to inform them about services (new and continued)
- Work with Coordinator of Outreach and Marketing to create an IR services card

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Meeting with departments happened as part of the initial rollout of the IR. Plans have been to partner with subject liaisons and to meet with departments with the liaisons present. At this point, we've been focusing on educating the subject liaisons through the Scholarly Communication Committee. However, the library Dean and one of the Associate Deans have been meeting with the deans of the various colleges.

IR services card: it's important to have a number of leave-behinds. The IR services card allows us to keep the IR in the faculty consciousness. There is also a bookmark, and some handouts. Sadly, we don't have the budget to get some really sweet swag.



*You've already done the work  
... Let us do the rest*

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 with an updated CV

A service of Raynor Memorial Libraries,  
 e-Publications@Marquette is a virtual  
 showcase of Marquette University's research.

e-Publications@Marquette provides long-term  
 preservation and worldwide electronic  
 accessibility for faculty research without  
 increasing your workload.



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The card reinforces ease of use, research impact and recognition through accessibility, and ties in the raising of MU's research profile.

## Tactics: Create general faculty awareness about new services

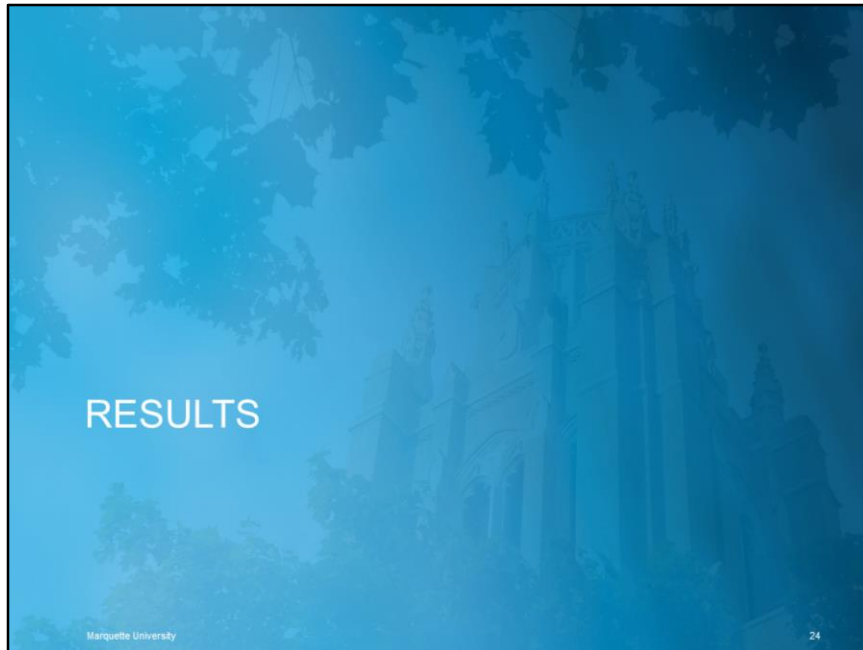
- Become involved in faculty instruction sessions that touch on the IR
- Embed Rose in new faculty FAD training
- Meet with departments to inform them about services
- Work with Coordinator of Outreach and Marketing to create an IR services card

## Assessment

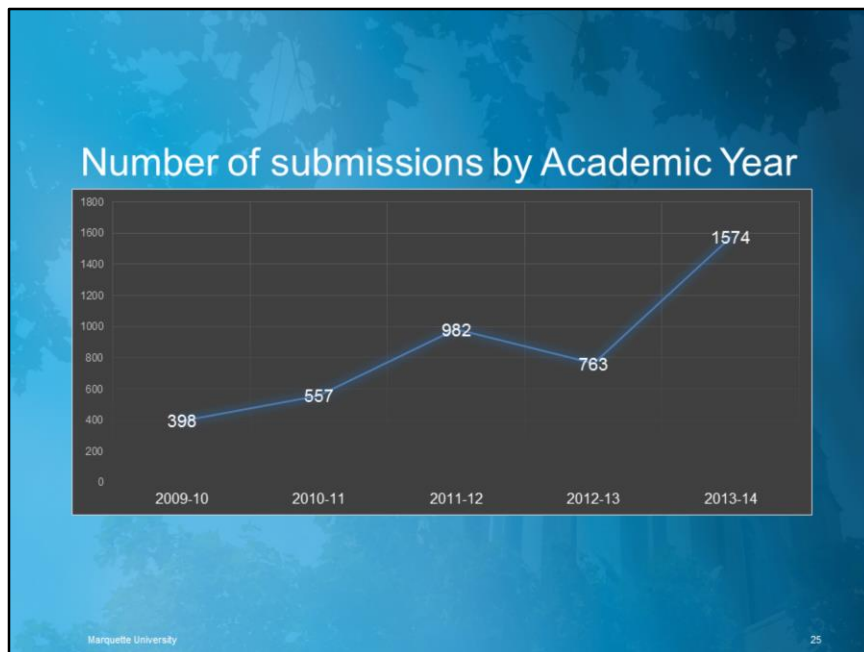
- Before and after # of submissions for AY 2013/14
- Before and after # of contributors for AY 2013/14

No benchmark or baseline numbers existed before this year. Because of the changeover in staff, and the establishment of the IR, it is difficult to choose any one set of numbers and use those as the baseline. Therefore, 2013/14 is the year that will produce the baseline numbers. Success for 2013/14 will be based upon general trends in the numbers, rather than reaching a specific benchmark.





Based solely on faculty numbers. Faculty were the priority audience for the 2013/14 marketing plan. Student deposit continued during this time, but those numbers haven't been examined in the way the faculty numbers have.



The drop in AY 2012-13 is indicative of the Digital Projects Librarian/Coordinator of Digital Programs position being empty during the hiring process. It took me about 6 months to really get my feet under me. However, AY 2013-14 was a good year when measured in terms of submissions. It continues a positive trend, when the anomalous 2012/13 AY is removed.

## Number of new contributors by Academic Year



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The first two years represent the initial push to get faculty on board. New contributors drop off after that, even allowing for the rebuilding year of 2012/13. However, the uptick for 2013/14 indicates general success for the marketing plan, probably even more so than the # of contributions does.

## Outcomes: Wildly successful

- Provide faculty with status documents on their work in the IR
- Solicit CVs from new faculty in their first semester on campus

Status documents are sent out twice a year, once during the fall semester, and once during the spring semester. It was a successful effort, though not as much when the pure numbers are looked at. 442 status reports were sent out, and 54 faculty (or 12%) responded with additional materials, or with author versions that would allow us to load full text. While the percentage looks small, it netted a number of new submissions. Changes to our email template also netted us many more author versions than we'd received in the past. Though the response rate is small, it is worth it for the materials we do receive, and the outlay is relatively minor.

New faculty CVs worked very well for us. 51 faculty were emailed, and we received CVs from 24 of them, that's 47%. In addition, other new faculty opted in to having their current publications harvested into ePubs from the FAD. Of the 87 new faculty submitters to ePubs, 24 were from that initial mailing.

### Outcomes: Unsure

- Integrate Rose in libraries' new faculty orientation
- Become involved in faculty instruction sessions that touch on the IR

It is difficult to quantify the effect of my participation in new faculty orientation and faculty instruction sessions. However, by offering the service in conjunction with various library initiatives, the IR stays with in the faculty's conscious. As such, it's important to continue these efforts.



## Outcomes: Unsuccessful

- Embed Rose in new faculty FAD training

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New faculty FAD training was unsuccessful. The Faculty Activities Database was rolled out a couple of years ago and faculty enter their activities as part of reporting for their annual reviews. It continues to provide us with a steady stream of research two times a year, the big training push is over. New faculty FAD training is practically non-existent and happens more on a trouble-shooting basis with the Office of Institutional Reasearch and Analysis. However, OIRA is a good partner to have for the IR, and we've maintained efforts to solidify that relationship.

### Outcomes: Too early to tell/ongoing

- Meet with departments to inform them about services
- Work with Coordinator of Outreach and Marketing to create an IR services card

Meeting with departments should happen in the wake of Library Dean and Associate Dean's meetings with college deans this past summer. Education efforts of subject liaisons have been progressing slowly, but they're integral to the process. The IR services card's success is difficult to quantify. There are plans for a mailing to all faculty in the fall of AY 2014/15, which will generate some data on its effectiveness.

## Outcomes: Pushed back until AY 2014/15

- Work with subject liaisons to acquire publication citations; DigiProg will request faculty permission to deposit





WHAT'S NEXT?

## AY 2014/15

- Refine marketing plan
  - Do more of what worked, less of what didn't
  - Baselines were established with this year's efforts
- Expand marketing plan
  - Include efforts with students

This process will need to be revisited on a regular basis, probably annually for the foreseeable future.

| Audience               | Goal   | Message   | Strategies   | Tactics  | Assessment   | Outcomes |
|------------------------|--|---|--|--|--|----------|
| Graduate Students      | Increase # of contributors   | "Build your academic presence online."  | Get grad students involved with SelectedWorks  | Contact Graduate Student Organization to set up workshops  | Before and after # of grad students with SelectedWorks accounts for AY 2014/15 |          |
|                        |  |   |  | Involve invested faculty in spreading the word to grad students.                                   |  |          |
| Undergraduate Students | Increase # of courses and/or instructors vetting student work for submission | Showcase MU's richly talented undergraduates. (Goes to MU's mission on excellence in teaching.) | Target faculty to remind them of potential and value of including student work in IR | 1. Conduct environmental scan of courses that would lend themselves to IR inclusion                | Before and after # of series of student work in IR for AY 2014/15              |          |
|                        |  |   |  | 2. Email department chairs to see which departments have undergrad awards and competitions.        |  |          |
|                        |  |   |  | 3. Work in research centers and programs on campus with final components that are suitable for IR. |  |          |



QUESTIONS?

## For more information on the survey

- Poster (includes survey questions and results):  
[http://works.bepress.com/rose\\_fortier/14/](http://works.bepress.com/rose_fortier/14/)
- Article: ["Marketing an Established Institutional Repository: Marquette Libraries' Research Stewardship Survey"](#) in *Library Hi Tech News*, Vol. 31, No. 6.

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